



Samples of Plan Experience

Carpenters Trusts of Western Washington

Carpenters Trusts is a large, multi-employer trust covering roughly 650 contractors and subcontractors, with over 7,000 active participants and 2,000 retirees. We work with Carpenters Trusts to provide retirement health plan valuations and twenty-year projections of the retirement benefit funding, including the effect of active participant's contributions, plan contributions, decrements, interest, and other factors, allowing the board to make informed decisions about funding strategies and negotiations with the contractors and unions.

King County

King County employs over 10,000 individuals in multiple plans and employee groups. We provide a full range of actuarial services to the County. On a regular basis, we generate incurred claim liability estimates, funding projections, renewal rates, retiree healthcare valuations, and actuarial attestations for Medicare Part D retiree drug subsidies. We also provide general actuarial support on an ad hoc basis.

MUST

Montana Unified School Trust is a multi-employer trust providing healthcare services to over 9,000 employees from school districts throughout Montana. We recently provided a second actuarial projection of their funding needs, along with recommendations for improving their existing forecasts to avoid funding shortfalls.

NAES Corporation

NAES Corporation takes over and manages the benefits for energy companies from across the US, covering over 1,200 active employees. Many of these companies retain their existing rate and contribution structure, creating the need for multiple rate sheets for each unique division. We provide quarterly incurred claim liability estimates, quarterly experience reports, annual funding projections, ad hoc benefit pricing estimates, and ongoing actuarial support.

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